Quality Assessment Toolkit for Hybrid Settlement Services in Canada

Wired: Evaluating Settlement Online (WESO)

ymcaottawa.ca

Land Acknowledgement

Wired: Evaluating Settlement Online (WESO) and the YMCA of the National Capital Region acknowledges that our offices, located in Ottawa, are on the traditional unceded territory of the Algonquin Anishinaabeg people whose presence here reaches back to time immemorial.

We recognize the sovereignty of Indigenous peoples who have lived in kinship with and served as stewards of this land, water, and air for thousands of years. We commit to respectfully listening, learning, and collaborating as an active participant in truth and reconciliation.

Indigenous Peoples have an enduring connection to this place, which we respect and honour in providing this important education tool for Service Provider Organizations all across Turtle Island. As you read through this Toolkit, we encourage you to reflect on the land that you are on, your relationship with the land, who the traditional keepers of the land are, and what the treaty relationship is. You can start by visiting native-land.ca to learn more.

Dedication

The YMCA of the National Capital Region acknowledges and values the efforts of the individuals and SPOs across Canada who provided their experiences and insights into the development of this resource.

This toolkit is dedicated to you.

For more information on the WIRED: Evaluating Settlement Online (WESO) project and the YMCA of the National Capital Region, please visit www.ymcaottawa.ca

This Toolkit is interactive

Please scroll over the buttons below to learn more.

National Capital Region

Executive Summary

Summary

The Quality Assessment Toolkit for Hybrid Settlement Services is a resource that provides a methodology and tools for Settlement Service Provider Organizations (SPOs) across Canada to evaluate the quality and effectiveness of their hybrid service delivery. It also highlights tips and best practices to support SPOs to adapt and improve their hybrid service delivery models. This toolkit is based on the findings of extensive research and engagement with newcomer clients and staff at SPOs across Canada. A summary of the research and engagement activities is provided.

Goals

The goals of this toolkit are:

1. SPOs have increased knowledge of how to evaluate their hybrid service delivery models.
2. Hybrid service delivery evaluation approaches and tools are adopted by SPOs, endorsed by the IRCC, and ultimately contribute to systems change.

The purpose of this toolkit is to provide evaluation tools for SPOs to assess the quality of their hybrid services and increase client intentions to use hybrid services. This toolkit also includes a **data collection tool**, in the form of a **client questionnaire**, that SPOs can use to collect client feedback.

The client questionnaire focuses on five dimensions that affect hybrid service quality and drive clients' intention to use hybrid services in the future, including:

1. Acceptance of Online Services
2. Staff Performance
3. Website Content and Accessibility
4. Web Security
5. Client Barriers to Accessing Online Services

WESO has created a **ready-to-use Excel** template that SPOs can use to generate a report from collected client questionnaires. This template helps you to create an automated report that directs your attention to areas that need improvement, areas that are inefficient, and areas that are strong. This toolkit also provides a tool for **Continuous Improvement** where you can keep a log of interventions needed, assign roles and timelines for improvement, and track the outcome of the intervention. The toolkit also provides an **action plan** for SPOs to **implement tools**.

Why the Toolkit Matters

Gathering feedback and the experiences of clients is critical to understanding the quality of the hybrid service and helps to identify and address issues when they arise and continuously improve service delivery. Importantly, offering an opportunity for clients to provide their experiences and insights helps them feel valued, heard, and that they are contributing to the process.

The analysis will provide you with specific areas where you need to take action to strengthen your service delivery and improve client experience. It will help you to prioritize your efforts, based on what your clients are telling you is important to them and where you perform or underperform. It will tell you where you need to improve, where you're doing well, where you may be overfocusing (i.e. you perform highly, but in areas that are not as relevant to your clients), and areas that are not particularly important to your clients.

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Section 1: Introduction

This section provides an overview of the purpose and objectives of the toolkit and how it can be used. We share a brief introduction about the contents in each section, define Hybrid Services and its benefits, and review key terms that will be used throughout the Toolkit.

Who is the WESO Toolkit for?

Whether you are new to delivering settlement services online or have been doing it for a while or even if you are considering providing hybrid services in the future, this toolkit has been designed to support frontline staff, program managers, and decision-makers at settlement SPOs in assessing and improving hybrid service delivery models. It will build knowledge and enhance organizational capacity to monitor and evaluate the quality of hybrid service delivery.

Objectives of the Toolkit

Ideally, this toolkit will support SPOs to:

- Implement a performance measurement framework to evaluate and improve the quality of hybrid services.
- Use data-driven decision-making in organizations.
- Understand how newcomer clients experience hybrid services.
- Understand barriers and improve experiences of newcomer clients when accessing hybrid services.
- Increase options and choices for newcomer clients to access services.

How to Use the WESO Toolkit

The information and tools provided in this toolkit have been designed by the WESO Project Team based on significant research and experiences shared by SPO staff and clients from across Canada. Recognizing the broad range of services offered by SPOs and the different local context they work within, the contents of this toolkit aim to cover broad perspectives, while also being useful, and action oriented.

This toolkit provides guidance, promising practices, tools, and templates for SPOs to monitor and evaluate the quality and effectiveness of their hybrid service delivery. It also provides tips and best practices to support SPOs to adapt and improve their hybrid service delivery models.

Please adapt and apply the information and templates in this toolkit to suit your existing organizational internal measurement systems and local context.

Navigating the WESO Toolkit

This toolkit has been divided into five main sections including this one. Each section provides:

Background on the topic and key definitions

- Tips and promising practices to consider
- Tools and templates that you can adapt and apply in your organization
- Resources for further information and reading

Section 1: Introduction to the Toolkit

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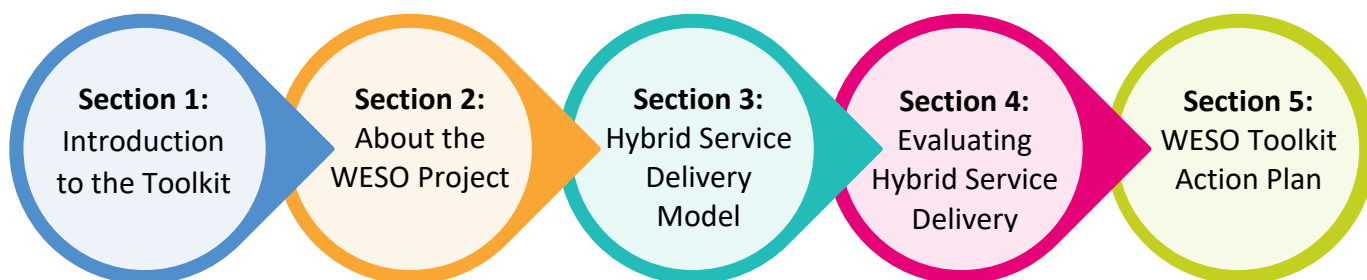
Section 1: Introduction to the Toolkit provides an overview of the purpose and objectives of the toolkit and how it can be used. We share a brief introduction about the contents in each section, define Hybrid Services and its benefits, and review key terms that will be used throughout the Toolkit.

Section 2: About the WESO Project provides an overview of the WESO project and a summary of the research and engagement activities the WESO project team undertook and how the results informed the development of this Toolkit.

Section 3: Hybrid Service Delivery Model provides an overview of the WESO Hybrid Settlement Service Delivery Model followed by descriptions of each of the five dimensions that affect newcomer client intentions to use hybrid services and increase access to hybrid services.

Section 4: Evaluating Hybrid Service Delivery reviews some basic aspects of evaluation and considerations for planning your evaluation of hybrid service delivery. We present an evaluation questionnaire for you to use with clients to get their feedback and assess the five dimensions of hybrid service delivery. We also provide a tool to help analyze the data to support decision-making and suggest areas where there may be room for improvement in delivering hybrid services.

Section 5: WESO Toolkit Action Plan provides an action plan template and activities to support you in implementing your evaluation of hybrid services.

Disclaimer: For advice on internet security, please consult an internet safety professional.

What is Hybrid Service Delivery?

Before we dive in, let's take a moment to define some of the key terms that are used throughout the toolkit.

Hybrid service refers to client interactions with service providers that are accessed both offline or in-person and through online platforms.

As seen in Figure 1, WESO uses some common classifications to define different hybrid service delivery formats.

Figure 1: **Formats of Hybrid Services Delivery**
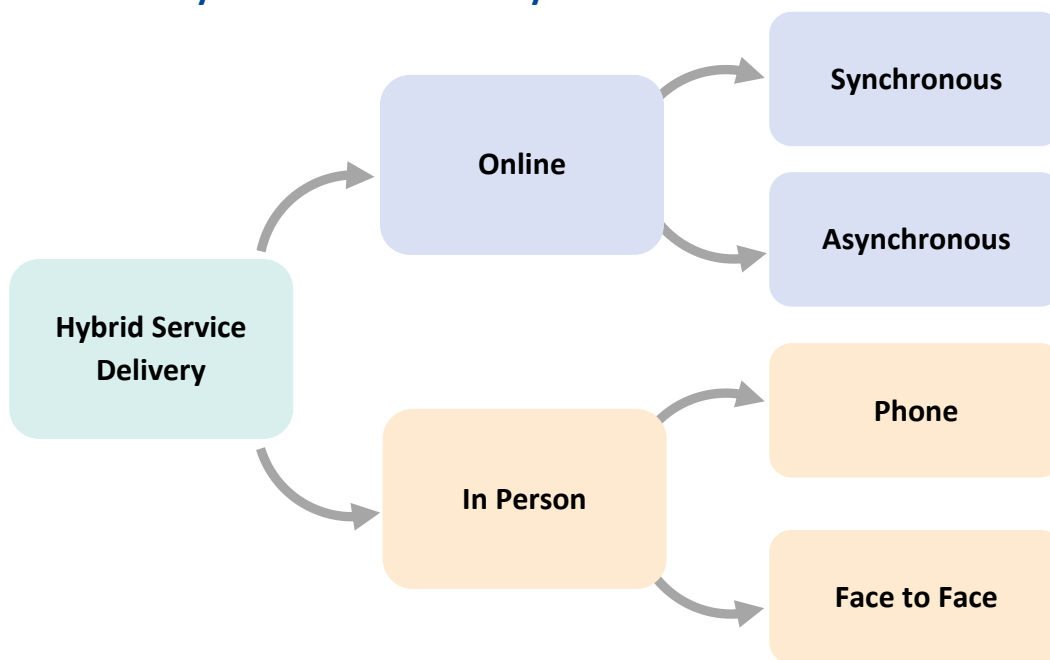
Definitions of Hybrid Service Formats

Online Services

Online services include all service interactions that rely on Internet access. Online services are divided into synchronous and asynchronous services.

Synchronous Services

Synchronous services refer to activities that are completed through simultaneous tech-mediated connection (i.e., video meetings).

Asynchronous Services

Asynchronous services refer to activities that are delivered via online technology with no human interaction (i.e., filling out a form on a website).

In-Person Services

In-person services include two categories of service: those that are completed via face-to-face interactions and those that are completed via a client's conversations over the phone without internet use.

Benefits of Hybrid Settlement Service Delivery

When designed and activated strategically, the technology aspect of service delivery can enhance clients' access while also improving service efficiency and effectiveness (Marshall, 2006).

Online services can provide core settlement services such as virtual consultations, webinars, and online training, in addition to supporting services such as registering for services, booking appointments, sending follow-up emails and newsletters, and announcing upcoming events. The strategic automation of supporting services can save staff time, reduce wait times for clients, increase accessibility to services, and support organizational efficiencies.

Overall, offering services online can:

- Save time on commuting to and from service provider offices.
- Save money on transportation including gas, bus tickets, and parking costs.
- Reduce paper waste and carbon emissions.
- Increase organizational efficiencies and operational consistency with automated forms and communication.
- Ease access for clients with physical disabilities.
- Ease access for clients who live in rural areas.
- Ease access for clients who are employed or who provide care for others.
- Reduce client wait times by planning virtual appointments and reducing walk-ins.

Section 2: About the WESO Project

This section provides an overview of the WESO project and a summary of the research and engagement activities WESO undertook and how the results informed the development of this toolkit.

Introduction to the WESO Project

The COVID-19 pandemic accelerated the need for settlement services to shift services to online and/or hybrid delivery. This shift has had an impact on the culture of settlement organizations as well as the introduction of new service delivery models. As organizations focus on re-building in a post-COVID-19 pandemic world, it is an opportune time to evaluate how online and hybrid services are practiced across organizations and how they can be promoted further.

To address these needs, under the Service Delivery Improvement (SDI) initiative, the WESO team conducted significant research in collaboration and engagement with SPOs and newcomer clients from across Canada to understand and gather knowledge and promising practices to support SPOs in monitoring and evaluating the quality of their delivery of online and hybrid services (see Figure 2).

The principles that guided the work of the WESO project are:

1. Addressing the digital divide, by not only understanding barriers newcomers face in accessing digital services and improving their access, but also increasing their options in choosing how they want to access services.
2. Increasing the capacity & knowledge of the SPOs on how to evaluate the quality of their hybrid services.

Definitions for these guiding principles can be found in Figure 3.

Figure 2:
Summary of WESO Project Research and Engagement Activities

Reviewed **250 studies and reports**

Focus groups with **60 SPO Staff**

Focus groups with **8 SPO Clients**

Survey completed by **240 SPO Clients** from across Canada

Survey completed by **260 staff representing 112 SPOs** from across Canada

In-person training for **40 in-person SPO clients**

Pilot training for **31 SPO staff** to improve the content of the toolkit

Figure 3:
Guiding Principles for the WESO Project

Digital Equity

Digital Equity is a condition in which all individuals and communities have the information technology capacity needed for full participation in society, democracy, and the economy. Digital Equity is necessary for civic and cultural participation, employment, lifelong learning, and access to essential services.

Digital Inclusion

Digital Inclusion refers to the activities necessary to ensure that all individuals and communities, including the most disadvantaged ones, have access to and use of Information and Communication Technology (ICT) solutions.

Digital Inclusion includes five elements:

1. Affordable, robust broadband internet service.
2. Internet-enabled devices that meet the needs of the user.
3. Access to digital literacy training.
4. Quality technical support.
5. Applications and online content designed to enable and encourage self-sufficiency, participation, and collaboration.

Digital Literacy

Digital Literacy is the ability to use information and communication technologies to find, evaluate, create, and communicate information, requiring both cognitive and technical skills.

WESO Research and Engagement Activities

The WESO Project Team conducted significant research in collaboration and engagement with SPOs and newcomer clients from across Canada to understand and gather knowledge and promising practices to support SPOs in monitoring and evaluating the quality of their delivery of online and hybrid services. The following is a summary of the research and engagement activities undertaken to inform the development of this Toolkit.

Activity 1: Digital Landscape Analysis

The aim of Activity 1 was to uncover evidence-based practices that SPOs find promising in delivering online or hybrid services and engaging clients. The findings of the analysis served as a basis and provided insights for conducting client surveys and experiments and developing the evaluation toolkit.

Literature Review

The literature review identified relevant hybrid service quality dimensions to be applied to service delivery in the settlement sector. In total, 250 studies and reports from peer-reviewed publication venues, government guides, and surveys were reviewed. Among these, 120 studies were chosen that underlined two major service delivery themes: conventional (traditional) service delivery and e-service delivery. Also, 28 articles that include both models of service delivery were chosen and summarized in a table that included the dimensions of service quality utilized in each model.

Focus Groups

15 focus groups with 60 SPO staff and 2 focus groups with clients were conducted. The focus groups identified themes related to hybrid service delivery, challenges in delivering hybrid services, and what services are preferred online vs. in-person. Focus groups suggested that there is no universal answer for whether services should be offered online or in person. It comes down to the newcomers' abilities, capacities, and preferences. Thus, the settlement sector should have a newcomer-centric framework that ensures access to services for all in the way that they want, need, and prefer.

Focus groups suggested that there is no universal answer for whether services should be offered online or in person. It comes down to the newcomers' abilities, capacities, and preferences.

Staff survey

Based on the literature review and results of the focus groups, a staff survey was designed to collect views regarding aspects related to hybrid service delivery, hybrid work models, and client barriers related to online services. In this regard, 260 complete responses from 112 settlement organizations in 12 provinces and territories of Canada were collected. The results showed that settlement staff is willing to provide hybrid services and support hybrid work arrangements. Specifically, 82.69% wanted to continue to provide online services post-pandemic, while 93.08% agreed or strongly agreed that hybrid services should continue post-pandemic.

Activity 2: Client Survey

A client survey was created to explore and assess the experience of SPO clients using hybrid services and to identify drivers that increase their intention to use hybrid services. The survey was also designed to be used as an evaluation tool by service providers with their clients to measure service quality. In total, 240 clients, proportional to each province's newcomer population, completed the survey. The collected surveys were then analyzed by SPSS and AMOS to carry out Exploratory Factor Analysis (to explore and group items in the questionnaire into dimensions), Confirmatory Factor Analysis (to confirm dimension groupings), and Structural Equation Modelling (to test interactions between dimensions).

The survey focused on five dimensions that affect hybrid service quality and drive clients' intention to use hybrid services in the future. The five dimensions that drive the intention to use hybrid services are:

1. Acceptance of Online Services
2. Client Barriers to Accessing Online Services
3. Staff Performance
4. Website Content and Accessibility
5. Web Security

Activity 3: Client Online Access Experiment

In Activity 3, the WESO project team engaged 40 newcomer clients who have only used in-person services as a case study. This engagement aimed to understand their reasoning, experiences, and barriers to accessing online or hybrid services. In addition, the activity provided information about devices and internet access, as well as a short digital literacy training session. The WESO team created a training curriculum and a comprehensive handbook, titled Digital Skills Training: Client Handbook (see Figure 4) that covered the basic digital literacy skills needed to access online services.

Activity 3 aimed to help newcomer clients establish a smooth transition to online or hybrid services by removing barriers as much as possible within the scope of the project.

Thus, Activity 3 aimed to help newcomer clients establish a smooth transition to online or hybrid services by removing barriers as much as possible within the scope of the project. In addition, the activity aimed to improve newcomer clients' access to online or hybrid services and to create increased knowledge about digital literacy, interest in, and confidence to access online or hybrid services.

Three in-person digital training sessions were delivered, where participants were asked to bring their own devices. One session focused on participants using smartphones only, while the others focused on clients using laptops. Clients completed a pre-training survey to assess their current digital knowledge and comfort level using the technology. During the training session, clients were encouraged to speak about and share their digital experiences.

The training covered areas related to everyday computer skills, including:

- Searching the Web
- Sending Emails with Attachments
- Joining Zoom Meetings
- Filling and Signing PDFs

A follow-up survey was distributed to the clients 30 days following the training to assess the impact of the training on their digital knowledge and habits.

Follow-up calls were made to all participants to ask if they would need additional support for the digital transition. All participants were given one-on-one consultations as needed. Moreover, a post-training survey was distributed two and a half months after the training to get client feedback regarding their transition to online services. The results show that 72% of the participants reported an increase in their knowledge of how to use the internet, and an increase in their knowledge of how to use a computer.

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The last phase of the client experiment included conducting interviews with ten training participants. Five of them indicated the need for additional training or support, while the other five reported that the training provided them with enough training and support. In addition, interview summaries documented challenges during the client transition stage and reported success stories resulting from the intervention. Transition plans for integrating clients into digital services were also created for those five clients who indicated they needed additional training, and another follow-up will be run by the team for another month and a half.

Figure 4: **Image of Digital Skills Training: Client Handbook**

Activity 4: Evaluation Toolkit and Training

Based on the findings, recommendations, and promising practices from the digital landscape analysis, the results of the newcomer client surveys and client access to online experiments, and the input from the advisory committee, Activity 4 aimed to create and develop the resources and the toolkit that can help SPOs across Canada to evaluate the effectiveness of their service delivery and adapt their models accordingly to improve services. The main output of this activity was the development of the Quality Assessment Toolkit for Hybrid Settlement Services handbook for SPO staff to evaluate their online and hybrid service delivery approaches. The purpose of the toolkit was to provide evaluation tools for SPOs to evaluate the quality of their hybrid services and to help them increase client intentions to use hybrid services.

Section 3: Hybrid Service Delivery Model

This section provides an overview of the WESO Hybrid Settlement Service Delivery Model followed by descriptions of each of the five dimensions that affect newcomer client intentions to use hybrid services and increase access to hybrid services.

WESO's Hybrid Settlement Service Delivery Model

A goal of the WESO Project was to increase newcomer access to online and hybrid services, so studying behavioural intentions was key to identifying the factors that increase the use of online services. To achieve this goal, based on the findings of the research conducted by WESO, an evidence-based Hybrid Settlement Service Model was designed. This model defines the five main dimensions that are critical success factors for delivering high-quality hybrid settlement services and drive the intention of newcomer clients to use hybrid services.

The five dimensions that determine the intention to use hybrid services are:

1. Acceptance of Online Services
2. Client Barriers to Accessing Online Services
3. Staff Performance
4. Website Content and Accessibility
5. Web Security

Table 1 summarizes the results of the Structural Equation Modelling that highlights interactions between dimensions in the model and classifies them according to the size of the relationship. Figure 5 provides a representation of how these different factors are connected. Figure 6 provides a summary of the five dimensions that determine the intention to use hybrid services.

Table 1: **Degree of Influence for Quality Dimensions of Hybrid Service**

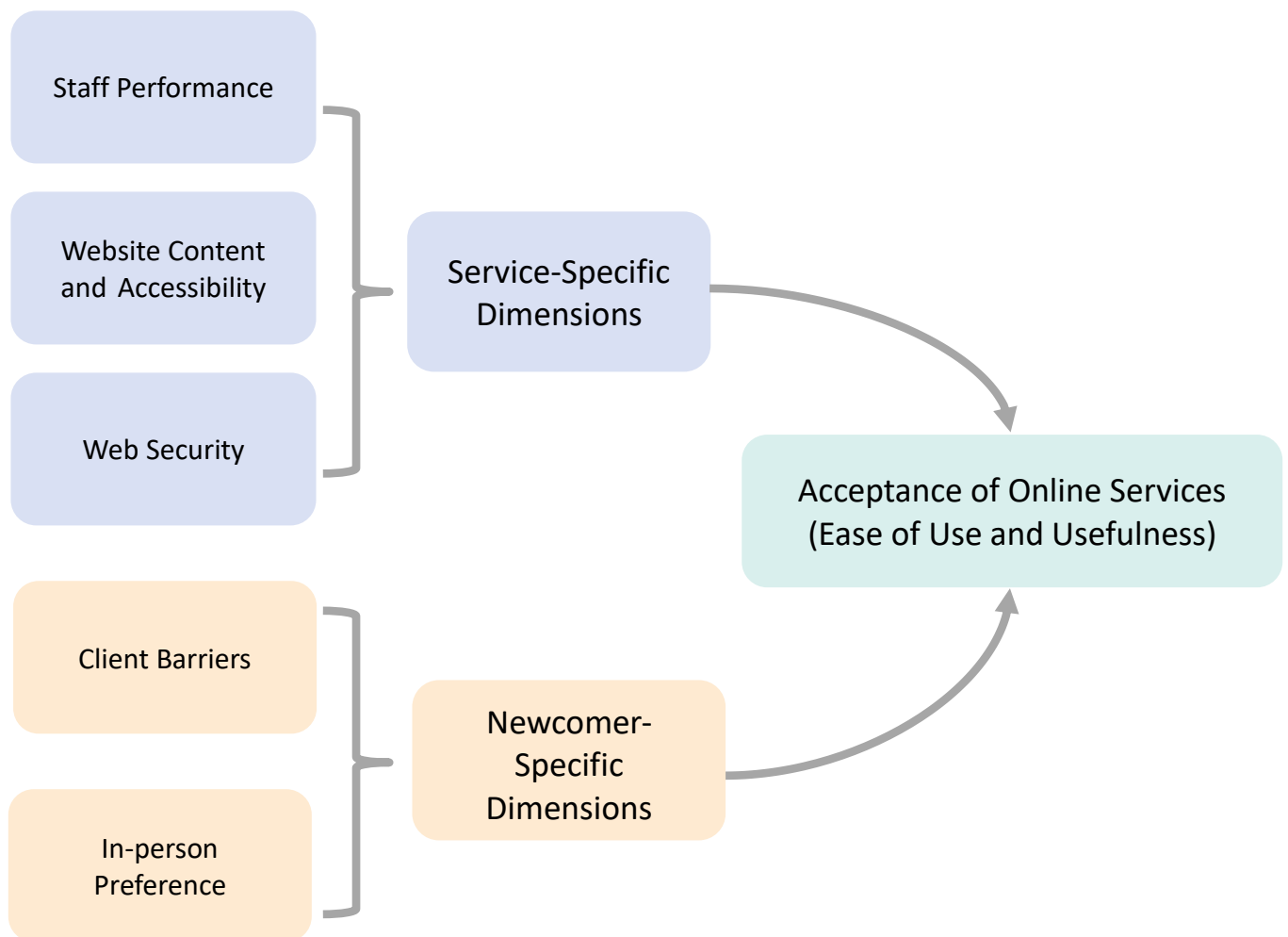| Dimensions Affecting Intention to Use Hybrid Services	Major Influencers	Minor Influencers
• Acceptance of Online Services	• Website Content and Accessibility • Staff Performance	• Digital Training • Language • Internet Speed • Preference for In-Person Services

Figure 5: **WESO Hybrid Settlement Service Delivery Model**

Figure 6: **Dimensions for Hybrid Service Delivery Model**
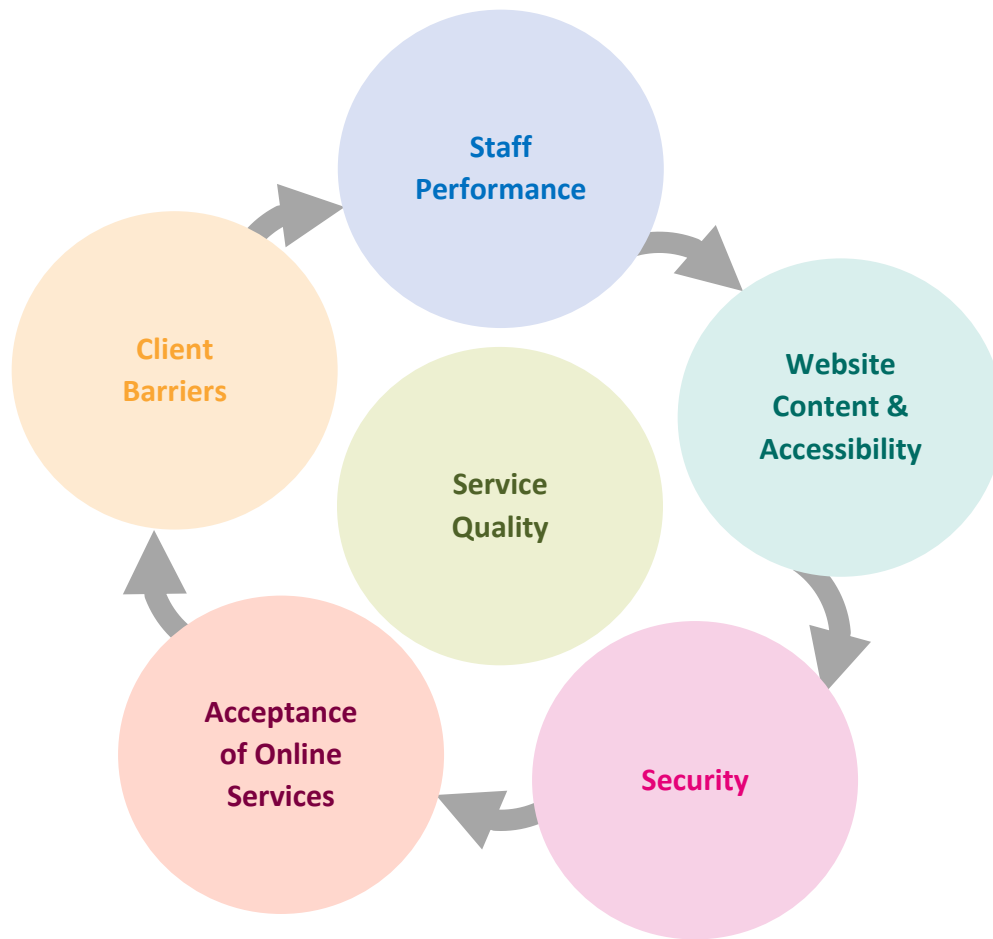
1. Acceptance of Online Services

Technology Acceptance Model **identifies** perceived ease of use **and usefulness as two crucial factors that have a substantial impact on people's intentions to use computers** (Davis at el., 1989). With this in mind, a dimension that measures the acceptance of online services was created, and we measured how other important dimensions influence the acceptance of online services and consequently, the intention to use them in the future.

"Acceptance of Online Services" relates to the client's comfort level of using online services, the perceived quality of online services compared to in-person, and the clients' perception of remote service benefits."

Key Indicators of Acceptance of Online Services

- Online services save money.
- Online services save time.
- Online services make it possible to access services that are not available locally.
- Online services are as reliable as in-person services.
- Online services are easy to use.
- Communication online is as easy for the client as in person.

Two Factors Affect the Acceptance of Online Services

1. Newcomer-Specific Dimensions
Newcomer-Specific Dimensions are centered around the client and include client barriers to accessing online services and the preference of the client for in-person services.

2. Service-Specific Dimensions
Service-Specific Dimensions are dimensions that are centered around the SPO and include the dimensions that should be addressed by management to motivate and encourage clients to use remote and online services.

2. Newcomer-Specific Dimensions:

Newcomer-Specific Dimensions include **Client Barriers** to accessing services and **In-Person Preference**. **Client Barriers** include the clients' limitations to access services, whereas **In-Person Preference** measures the clients' preference to visit a settlement office.

a) Client Barriers

Identifying and removing barriers for clients to access online services is an important component of digital equity. The Five A's of the Technology Access Framework outlined in Table 2 addresses the social and economic barriers to digital inclusion (Roberts & Hernandez, 2019).

Based on the reviewed settlement sector studies and investigations in the literature, relevant client barriers related to the settlement sector were summarized. The most repeated barriers are digital skills, equipment sharing, language, and cost and speed of internet connection (See for example; The Alliance for Healthier Communities, 2020; North York Community House, Department of Imaginary Affairs & Campana, 2020; Ekmekcioglu,, Black & Campana, 2022).

Table 2: **The Five A's of Technology Access**

Element	Definition
Availability	Whether or not the technology is available to the client. For example, the reliability of internet coverage in their area.
Affordability	Whether or not the client can afford the price of technology, including devices and the cost of the internet.
Awareness	Whether or not the client is aware of the digital services.
Ability	Refers to digital literacy and the ability of the client to access online services.
Agency	Whether or not the information to access digital services is shared clearly by providers.

Key Indicators of Client Barriers

- Language barrier
- Digital literacy
- Device ownership
- Cost and speed of internet

Key Indicators of In-Person Preference

- Preference to visit a settlement office in person

b) In-Person Preference

In a survey to investigate the effect of COVID-19 on the settlement sector in Canada, it was found that personal preference may interfere with clients' choice of having online or in-person services and it was advocated in this report to examine this in future studies (North York Community House, Department of Imaginary Affairs & Campana, 2020). In-person services attempt to address family and community issues by focusing on the social and physical environment of the local community and offering better integrated and more accessible service systems to those who live there. Most importantly, in-person services aim to address community-level issues such as social isolation, lack and overlap of services and social injustice. These services are usually physically attached to the communities from which clients are served directly (Ritter et al. 2022). This was evident from our research findings in small communities such as the Northwest Territories and Yukon where settlement organizations in these provinces reported a preference for in-person services. **Model findings suggest that in-person preference has a negative effect on accepting online services, nevertheless, the size of the relationship is small compared to other influencers, indicating that in-person preference only has a minor effect on accepting online services.**

3. Service-Specific Dimensions

Service-Specific Dimensions are dimensions that are centered around the SPO and include the dimensions that should be addressed by management to motivate and encourage clients to use remote and online services. The service-specific dimensions include **Staff Performance**, **Website Content and Accessibility**, and **Web Security**.

a) Staff Performance

Staff performance measures the assurance, empathy, competence, reliability, and responsiveness of the settlement service staff. The WESO client questionnaire has a dedicated section for the evaluation of staff performance. These questions can help spot problems and excellence in staff performance. It also allows the manager to direct training efforts where it matters. Unlike e-services, the delivery of settlement services relies heavily on human-to-human interaction, whether services are provided remotely or in person. On this basis, the service quality in the proposed model is still characterized by interactions among humans. **Staff performance is measured using the SERVQUAL scale developed by Parasuraman et al. (1988), which measures staff performance based on: reliability, responsiveness, assurance, and empathy.** Overall, responsible staff performance and execution of delivery is the core driver of intention to use services in the settlement sector.

Key Indicators for Staff Performance

- Staff is polite and patient when delivering services.
- Staff gives their full attention when delivering services.
- Staff provides service during hours that are convenient to clients.
- Staff is dependable and supportive when delivering services.
- Staff provides explanations and answers all questions when delivering services.
- Staff helps establish social and networking connections during service delivery.
- Staff provides services in a timely manner.
- Staff provides accurate information when delivering services.
- Staff easily delivers services using digital tools such as computers.
- Staff protects the privacy of personal information when delivering services online.

b) Website Content and Accessibility

Websites and online pages with content for newcomer services are the key knowledge sources for newcomers regarding the types of services available and the means to access them, whether in person or online. The website content dimension includes the design and appearance, organization, information content, ease of navigation, and communication/accessibility of the website (Ojasalo (2010). Websites offer facilitation services that are useful for all six service categories funded by IRCC including program information, eligibility criteria, registration, appointment booking, and information about upcoming events and group sessions.

A well-organized website would enhance service quality and save SPO staff unneeded calls or direct appointments. This in turn saves time and resources while allowing capacity and resources to be used where they are most needed. Website content has been studied in the e-service context and is found to be related to increasing the user-friendliness of the service and to enhancing client satisfaction (see for example; Santos, 2003; Nawfleh, 2018; Kavitha & Gopinath 2021-). In addition, the current study further claims that nowadays no service is exclusively internet-free. This is also very true for the settlement sector. Clients review websites before engaging in any type of settlement service, whether online or in person. This is supported by the statistics provided by Google for consumer behaviours before visiting a physical location. According to Google, 76% of consumers look for a company's online presence before visiting in person (Google/Purchased Digital Diary, 2016). Moreover, 83% of U.S. shoppers who visited a store used online search before going there (Google/IPSOS, 2019). Our model findings suggest that the quality of website content and accessibility of services are major contributors for clients to accept online services.

Key Indicators of Website Content and Accessibility

- Organization's website provides clear information about how to access settlement services.
- Organization's website is easy to explore and use.
- Organization's website is well-organized and provides enough information about different settlement service categories.
- Organization's website has self-service options that the client can use to access services.

c) Web Security

The hybrid system should be built with information security in mind because, in many cases, clients provide sensitive information to the settlement personnel such as their Social Insurance Number and Identification. Security of client information is also mandated by IRCC. The security dimension refers to clients' perception of privacy of shared information (Wolfinbarger & Gilly, 2003). In the e-service context, many scholars find that client perceptions of web security influence their intention to engage in e-services (see for example; Santos, 2003; Wolfinbarger & Gilly; 2003; Ganguli & Roy, 2010; Alwaneh et al., 2013; Osman et al., 2014; Nawafleh, 2018; Taherdoost, 2018).

There are two things to consider: real security and risks and perceived security. Real security refers to real due diligence in dealing with clients' information. The organization must consult with cyber security experts to take all measures to protect client information and train staff to deal with private information safely. Perceived security, on the other hand, refers to the perception clients have about the security and safety of providing their information to the SPO.

Our research suggests that client perceptions about web security do not affect the willingness of clients to participate in online services and this marks an attitude change toward how web security influences engagement in online services post-pandemic. The results suggest that clients are more open to online transactions. This finding is backed by Hackbarth and Cata (2021), who performed a Delphi study in 2011 and 2020. Based on their findings, clients have a more positive attitude towards technology and a lower perception of risk. Nonetheless, our findings indicate that security does have an impact on clients' perceptions of staff performance. Clients who thought their transactions were safer tend to give a better evaluation of staff performance.

Key Indicators of Web Security

- Providing personal information online to receive settlement services is safe and secure.
- Clients are comfortable providing UCI/PR numbers or other personal information while using online settlement services.
- Clients are certain that no one, except for the settlement service staff, has access to their private information.

Section 4: Evaluating Hybrid Service Delivery

In this section, we review some basic aspects of evaluation and considerations for planning your evaluation of hybrid service delivery. We present an evaluation questionnaire for you to use with clients to get their feedback and assess the five dimensions of hybrid service delivery. We also provide a tool to help analyze the data to support decision-making and suggest areas where there may be room for improvement in delivering hybrid services.

Benefits of Evaluation

1. Integrated organizational learning
2. Continuously improved programs and services to meet the needs of clients
3. Strengthened relationships and teams
4. Data-Driven decision-making
5. Efficient use of time and resources
6. Generating new ideas
7. Enhanced ability to communicate benefits of program

Evaluation Defined

Evaluation is a systematic process of gathering information and evidence to understand the effect and significance of an action or intervention.

An intervention may be an activity, an event, an interaction, or the use of a resource. In this case, it is the delivery of hybrid services.

When done properly, evaluation can be a powerful organizational tool to discover, assess, ascertain, and document the impact of a project, program, service, approach, or value.

Why Program Evaluation is Important

According to the IRCC:
"Evaluating program progress and reporting on results are good management practices. Evaluations give senior managers evidence-based information to improve programming, shape new policies and programs, and ensure value for money. Evaluation studies consider a program's ongoing need, intended outcomes, and whether there are alternative, more cost-effective ways to meet objectives."

Planning Your Evaluation of Hybrid Service Delivery

Evaluation can feel overwhelming for many organizations, but it doesn't have to. When you integrate evaluative thinking into your practices and systems within the organization, such practices can be seamlessly embedded into program and service design. What is most important is that there is a common understanding of evaluation practices and a common language across teams and that teams are aligned on the purpose of the evaluation. In addition, key roles and responsibilities should be clearly defined, and there should be clarity about how and why information is collected and how it can be used.

This section will walk you through the information you need to develop a plan to evaluate hybrid service delivery in the organization. This section is designed in a way that you can adapt and apply the information and tools to your existing programs' internal monitoring systems.

Purpose of the Evaluation

The first step of the evaluation process is to define the purpose of the evaluation.
In this case, the purpose of the evaluation is to measure the quality of hybrid service delivery.

Key Components of an Evaluation Plan

As shown in Figure 7 Key Components of Evaluation Plan, in general, five key components of evaluation should be considered in the evaluation plan. These are:

1. Asking relevant and meaningful questions
2. Collecting data using appropriate methods to answer the questions
3. Making sense of the data through analysis
4. Sharing the data with key individuals or groups
5. Using the data to inform decision-making, strengthen services and relationships, and deepen impact for clients

The following provides an overview of the considerations for each of these key components. Combining these will help to create an evaluation framework.

Figure 7:
Key Components of Evaluation
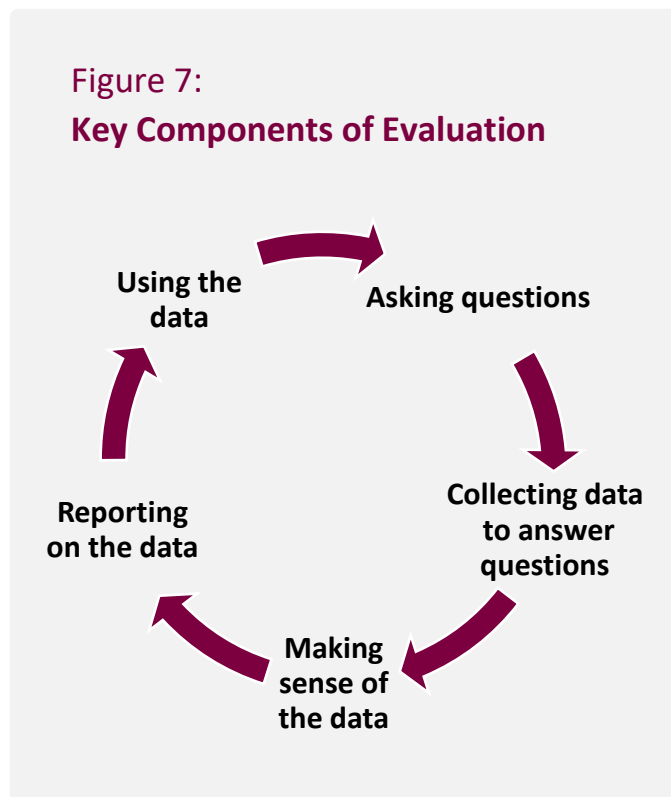
Evaluation: Ethical Considerations

When planning for evaluation, it is important to be clear about ethical standards and expectations. Evaluation activities should be designed and delivered with the privacy and well-being of participants as a top priority. The following are some ethical practices that should guide the implementation of your evaluation.

- **Integrity:** Evaluators should prioritize honesty, respect, transparency, and integrity throughout the evaluation process. Ideally, evaluators should be free of any conflict of interest.
- **Informed consent:** Clearly communicate the purpose of any evaluation tool, how the privacy of data will be ensured, how evaluation results will be used, and information about any potential risks associated with participating before seeking informed consent.
- **Minimize risks:** Design evaluation tools and processes in a way that reduces any risks to participants (e.g., consider using trauma-informed and culturally safe approaches, refrain from asking questions that might upset somebody or cause harm, and ensure information and results are stored securely).
- **Reduce barriers:** Reduce barriers to participation (e.g., ensure engagement sessions are fully accessible, use plain language, consider timing and location, and consider compensation for participants).
- **Share Results:** Consider proper ways to share the results of the evaluation with participants in an accessible manner. For example, provide a summary of the evaluation results and how those results can be used to strengthen programs, and service delivery, and support organizational efforts.

Figure 8: WESO's Hybrid Service Evaluation System

Client receives hybrid services → Client provides feedback through the client questionnaire → Analyze data using Excel template → Take action to improve client experience

WESO's Hybrid Service Quality Evaluation

Gathering the feedback and experiences of clients is critical to understanding the quality of the hybrid service and helps to identify and address issues when they arise, and continuously improve service delivery. Importantly, offering an opportunity for clients to share their experiences and insights helps them feel valued, heard, and that they are contributing to the process.

Based on the research carried out and the engagement with newcomers and SPO staff, WESO has developed a Hybrid Service Evaluation System to assess the five dimensions of hybrid service delivery. On this basis, robust tools have been created to support SPOs in gathering the information needed from clients, analyzing, and using data, taking actions to strengthen hybrid service delivery, and improving client experience (see Figure 8).

Tool 1: Hybrid Service Quality (HYSQUAL) Client Questionnaire

About the Questionnaire

The HYSQUAL questionnaire is an evaluation tool for clients to provide feedback after they have received settlement services in a hybrid format. The questionnaire asks clients about their level of agreement using statements related to their experiences and satisfaction regarding the five main dimensions of hybrid service delivery. This includes:

1. Acceptance of Online Services
2. Staff Performance
3. Website Content and Accessibility
4. Web Security
5. Client Barriers to Accessing Online Services

The questionnaire also includes questions about the client's intention to use online and in-person services in the future.

The questionnaire utilizes an Importance Performance Analysis (IPA) scale and a Likert Scale (see Table 3) in which each quality dimension is evaluated based on performance/agreement and importance to clients.

Table 3: Guide for Questionnaire Likert Rating Scales

Agreement scale	Importance scale	Corresponding Numerical Value
Strongly agree	Extremely important	5
Agree	Very important	4
Neither Agree nor Disagree	Moderately important	3
Disagree	Slightly important	2
Strongly Disagree	Not at all Important	1
Irrelevant to me	Not sure	0

How to Use the Questionnaire

To collect client feedback, frontline workers will need to send the HYSQUAL questionnaire to clients to fill out after receiving services in a hybrid format. The questionnaire could be developed using a survey-building tool such as SurveyMonkey or Google Forms. The link to the questionnaire is then shared with the client, who is then asked to provide feedback on the services received.

HYSQUAL Client Questionnaire

Client Satisfaction	5 Scale = Agreement
I am satisfied with the settlement services provided to me by the settlement organization.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
I will recommend settlement services to others.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
I like to complete a service in the settlement service office, in person.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me

Acceptance of Online Services	5 Scale = Agreement
I feel confident and can communicate as easily with settlement service staff online as I can in person.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
Online settlement service delivery makes it possible for me and other newcomer clients to access services that may not be available to me locally.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
Online settlement services are as reliable and accurate for me as in-person services.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me

I can save money if I access settlement services online instead of in person.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
I can save time if I access settlement services online instead of in person.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me

Intention to Use Hybrid Services in the Future	5 Scale = Agreement
I appreciate having multiple service delivery options such as in-person, online, and hybrid.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
Settlement service organizations should make all services available online.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
Settlement service organizations should make all |services available in person.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me
I will continue to use a mix of online and in-person services in the future.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me

Service-Specific Dimensions

Staff Performance	5 Scale = Agreement	5 Scale = Importance
Settlement service staff are polite and patient when delivering services to me.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff give me their full attention when delivering services.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff provide service during hours that are convenient to me.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff are dependable and supportive when delivering services to me.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff provide explanations and answer all my questions when delivering services.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff can help me establish social and networking connections during service delivery.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure

Settlement service staff can provide services to me in a timely manner.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff can provide accurate information to me when delivering services.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff can easily deliver services to me using digital tools such as computers.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service staff can protect the privacy of my personal information when delivering services online.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure

Web Content and Accessibility	5 Scale = Agreement	5 Scale = Importance
Settlement service website provides clear information about how to access settlement services.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service website is easy to explore and use.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
Settlement service website is well-organized and provides enough information about different service categories.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure

Web Security	5 Scale = Agreement	5 Scale = Importance
Providing my personal information online to receive settlement services is safe and secure.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
I am comfortable providing my UCI/PR number or other personal information while completing online settlement services.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure
I am certain that no one except for the settlement service staff has access to my private information.	☐ Strongly agree ☐ Agree ☐ Neither Agree nor Disagree ☐ Disagree ☐ Strongly Disagree ☐ Irrelevant to me	☐ Extremely important ☐ Very important ☐ Moderately important ☐ Slightly important ☐ Not at all Important ☐ Not sure

Please choose the statements that you are able to do. Check all that apply.

☐ I can access and complete settlement services online without help from the settlement service staff.

☐ I am comfortable completing services over a phone call with settlement service staff.

☐ I am comfortable receiving settlement services or information about these services via a video-conferencing application such as Zoom or Microsoft Teams.

☐ I am capable of following the instructions sent via email or text/digital messaging about completing a settlement service after I have a consultation with a settlement service staff.

☐ I can fill out forms online from home with the support of the settlement service staff.

☐ I am not able to do most of this, and I don't need to do it.

☐ I am not able to do most of this, but I will appreciate having a basic computer course taught to me.

Please choose the statements that apply to you.

☐ I have difficulty paying for an internet connection because it is expensive.

☐ I don't have an internet connection.

☐ I need basic computer training to access online services. (Basic computer training includes sending emails, filling out online forms, scanning and uploading documents, filling out and signing pdfs electronically, etc.).

☐ My English/French language skills make it difficult to access online settlement services and communicate with staff online.

☐ Sharing a device (computer or laptop) with others at home limits my access to settlement services online.

☐ My internet connection is slow and unreliable, which makes it difficult to access online settlement services.

Choose how you prefer to receive the following settlement services.			
Service Category	**In-Person**	**Online**	**Hybrid**
Employment services	☐	☐	☐
Needs assessment and referrals	☐	☐	☐
Language assessment (tests to place you in the language training program suitable for your English/French language skills)	☐	☐	☐
Language training sessions	☐	☐	☐
Community connection services (for example, information about community events and activities)	☐	☐	☐
Information and Orientation (for example, information about tax filing, information about getting IDs, i.e., a driving license)	☐	☐	☐

Now that you have gathered data from clients, the next step is to analyze and make sense of it in order to inform decision-making. WESO has provided an easy-to-use Excel spreadsheet that will help you analyze the data generated from the HYSQUAL tool. In the following section, we share the features and benefits of the Excel Data Analysis Template.

Tool 2: Ready-to-Use Excel Template for Data Analysis

About the Data Analysis Template

After the data has been collected, it can be analyzed and interpreted to inform decision-making and to add value to program and service delivery. Once clients have completed the client questionnaire, data can be inputted into the Excel Data Analysis Template. This template is easy to use and includes simple instructions and guidance.

How to Use the Data Analysis Template

Figure 9 shows how users will be able to navigate the different Excel worksheets in the template in a simple and standard manner, similar to navigating a website. The template contains a homepage that includes links to important tabs. The homepage also contains a complete guide on how to use the template and the contents of each tab. You should be able to navigate to all pages in the Excel document.

Once you input the data from the client questionnaire into the Excel template, it will automatically generate the following:

1. A full Importance Performance Analysis (IPA) report and chart.
2. Categorized summary statistics for each of the five hybrid service delivery dimensions.
3. Dashboards for Service-Specific and Newcomer-Specific Dimensions.

A description of each of these outputs is provided in the next section.

Figure 9: **Image of Excel Data Analysis Template Home Page**

Description of Analysis Outcomes

The following is a description of each of the outputs you will get if using the Excel Template.

1. A Full Importance Performance Analysis (IPA) Report and Chart

The Importance Performance Analysis (IPA) developed by Martilla and James (1977) is a simple managerial tool that gives clear and practical recommendations based on client responses. The SPOs can evaluate the statements based on importance and performance. In the process, the IPA analysis classifies statements into four quadrants based on the gap between performance and importance (See Figure 10). The four quadrants are characterized as follows:

1. The "Needs improvement" quadrant represents statements that rank low in performance but high on the importance scale. These areas need intervention by the organization.
2. The "Possible overkill" quadrant represents statements that rank high on the performance scale but low on the importance scale. These are areas where you might be able to make decisions about what is not important to the client.
3. The "Keep up the good work" quadrant represents areas with high performance and high importance. These are the points that your organization is getting right and should continue to focus on.
4. The "Low priority" quadrant represents areas of low performance and low importance. This quadrant represents areas that the settlement organization does not need to focus on.

2. Categorized Summary Statistics for Each of The Hybrid Service Delivery Dimensions

The Excel template generates a summary of client responses for each dimension, meaning that the user of the template will be able to see each statement in the HYSQUAL tool along with the number and percentage of clients that chose a certain answer from the scale. Each statement will appear under the relevant dimension. Figure 11 shows an example of how summary statistics appear in the Excel template. For instance, the figure shows the three statements related to website content and accessibility and how many responded to each statement in terms of count and percentage.

3. Dashboards for Service-Specific and Newcomer-Specific Dimensions

The Excel template also generates charts and dashboards to summarize responses to statements under the Service-specific dimensions and the Newcomer-specific dimensions. Figure 12 and Figure 13 provides an example of these charts in the Excel template. For the Service-Specific Dimensions, you can also click on the IPA Quadrants below each chart. This will enable you to view statements under each quadrant separately for easy access to IPA results.

Figure 10: **Example of IPA analysis**

Figure 11: **Example of Categorized Summary Statistics by Statement**

	Website content and Accessibility		
	Settlement service website provide clear information	Settlement services webistes are easy to explore	Settlement service websites are well-organized and
Agreement scale (count)			
Strongly agree	113	71	96
Agree	166	132	160
Neither agree or disagree	16	73	48
Disagree	6	16	18
Strongly Disagree	28	32	9
Don't Know	4	8	2
Importance Scale (count)			
Extremely important	73	130	71
Very important	126	112	133
Moderately important	66	45	74
Slightly important	60	35	48
Not at all Important	9	12	8
Not sure	0	0	0
Agreement scale (Percentage)			
Strongly agree	33.93%	21.39%	28.83%
Agree	49.85%	39.76%	48.05%
Neither agree or disagree	4.80%	21.99%	14.41%
Disagree	1.80%	4.82%	5.41%
Strongly Disagree	8.41%	9.64%	2.70%
Don't Know	1.20%	2.41%	0.60%
Importance Scale (Percentage)			
Extremely important	21.92%	39.16%	21.32%
Very important	37.84%	33.73%	39.94%
Moderately important	19.82%	13.55%	22.22%
Slightly important	18.02%	10.54%	14.41%
Not at all Important	2.70%	3.61%	2.40%
Not sure	0.00%	0.00%	0.00%

Figure 12: **Service Quality (Service-Specific) Dimensions dashboard**
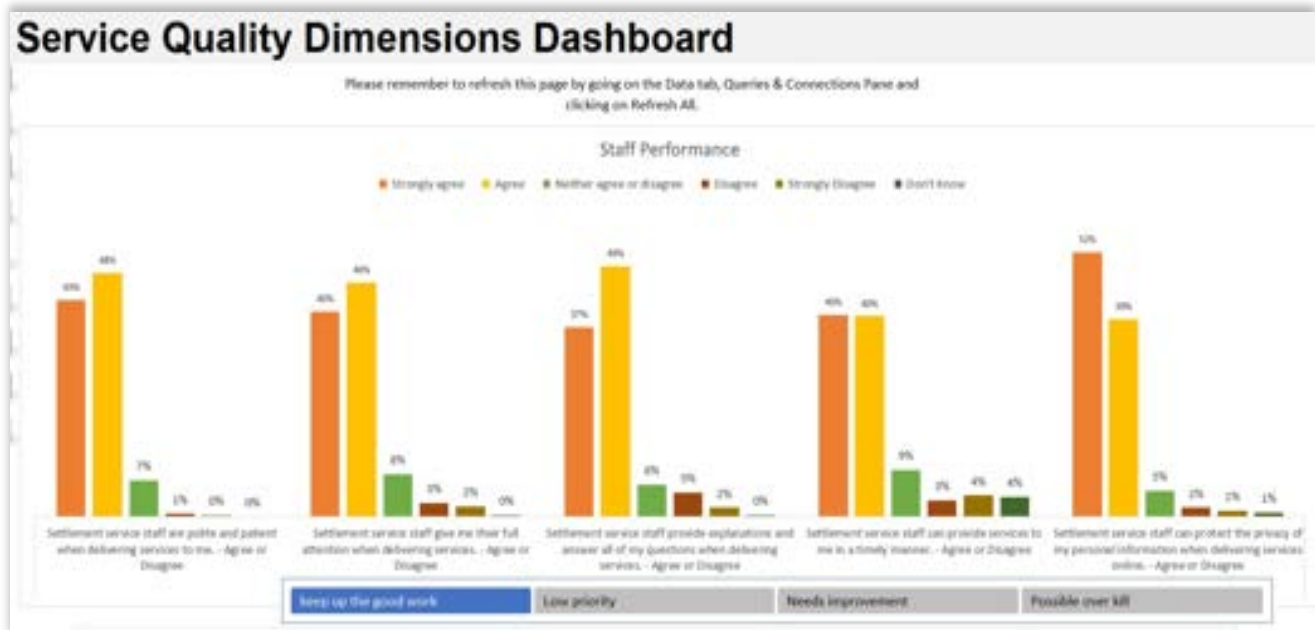
Figure 13: **Newcomer-Specific Dimensions Dashboard**
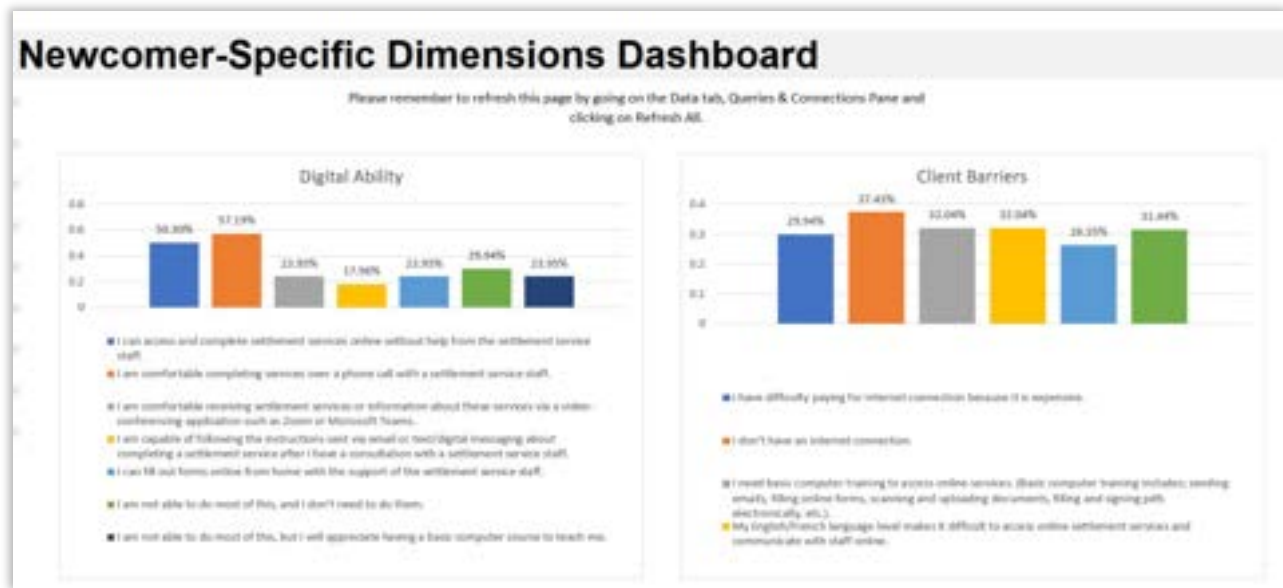
Tool 3: Continuous Improvement Plan

After reviewing the results of the Importance Performance Analysis (IPA) in the Data Analysis Excel tool, it is time to use this knowledge to implement changes and plan the action required to improve service quality. You can use this template to make a log of areas flagged by the IPA report which need intervention from your side, assign responsibility and timelines, and review the outcomes of the intervention. An Excel Template is created for this purpose in which you can translate the results of the IPA report into action and make plans to implement changes.

REFERENCE This is the statement in the IPA that needs more work i.e., Quadrant 1 & 4	INDICATED ISSUE	ACTION REQUIRED	REQUIRED BY DATE	RESPONSIBLE PERSON TO ACTION	OUTCOME AND DATE CLOSED

Evaluation Team: Key Roles and Responsibilities

Now that you have a tool to collect and analyze data, it is time to get a deeper understanding of who is going to be involved in the process implementation.

Overall, determining the focus of the evaluation, how decisions will be made, and how information is collected, analyzed, and reported is critical to the success of any evaluation. In addition, having clarity on who is responsible for what can not only support a stronger evaluation but also aid teams in working together effectively. The size and scope of your evaluation may depend on the capacity of your organization. See Table 4 Key Roles and Responsibilities for ideas about the roles and responsibilities you may want to consider for your evaluation.

Table 4: **Key Roles and Responsibilities**

Role	Responsibilities
Lead Evaluator	- Coordinate evaluation planning and processes - Establish the purpose of the evaluation - Identify who will be involved in the evaluation - Develop an evaluation plan - Determine information needs - Develop data collection tools - Analyze data - Report data - Ensure the project team is aligned and resourced properly - Establish timelines
Evaluation Team	- Provide ideas and insights into the evaluation design and plan - Provide feedback on data collection tools and approaches to collecting data - Collect data - Support analysis of data - Contribute to developmental reflection activities - Share findings of the evaluation - Integrate learning into practice

In this section, we provide you with an assign role sheet template and the set of activities needed to implement your evaluation of hybrid services.

What should you do first?

You've taken the training, and you now have the Toolkit, template, and other resources. The WESO team is available to support you as you start to monitor and evaluate the quality and effectiveness of hybrid service delivery.

The next few weeks are crucial. If you've taken the training alone, it's time to start the conversation with your colleagues and the program and organization's leadership.

Why does this matter?

- The WESO team is only available to support you until the end of 2023.
- The sooner you apply what you've learned, the more you'll remember and the more added value you will experience!
- You're already providing hybrid services and have been for some time. Monitoring and evaluating your service quality and effectiveness will mean better outcomes for newcomers and higher morale for staff.

What to do next and in what order

This toolkit provides you with a roadmap for your next steps. On the next page is an action plan and the corresponding activities to help you implement an evaluation of your hybrid service delivery. It outlines the immediate steps you can take to ensure that the training you've taken is implemented effectively.

Action Plan

ACTION DESCRIPTION/TASK	HOURS ALLOCATED	TIMELINE	ASSIGNED TO	WESO RESOURCES	WESO TRAINING MODULES
1. Attend the main training session. At the end of the first training session, you will receive an Action Plan Sheet. **Assign roles in Action Plan.** Fill out this Action plan template to assign roles as a first step to plan your evaluation and email it back to WESO team by the end of the first week. As a first step to implementing the Evaluation Plan, it is important to assign staff to each action required in this sheet. **Follow up Meeting with WESO team to finalize the action plan.** WESO team will contact you to schedule a meeting in the second week to discuss your action plan. **WESO Office hours:** **9 AM - 4 PM** **Monday to Friday**	3 hours	Week 1-2		Quality Assessment Toolkit for Hybrid Settlement Services in Canada. • **Action Plan**	**Main Module (Obligatory) - Week 1: Introduction to WESO Quality Assessment Framework and Tools** The module briefly explains the WESO Evaluation system and guides users on how to use the tools to evaluate their hybrid settlement services.

NOTES:

2. Review the WESO Hybrid Service Evaluation Questionnaire. **Use or Customize the Client Questionnaire.** Collaborate with the WESO Team to either utilize the Hybrid Service Quality (HYSQUAL) Client Questionnaire as is or customize it according to your organization's specific requirements. **Follow up meeting with WESO team.** WESO team will contact you to arrange a meeting to help you finalize your questionnaire. **WESO Office hours:** **9 AM - 4 PM** **Monday to Friday**	2 hours	Week 3-4		Quality Assessment Toolkit for Hybrid Settlement Services in Canada. • **Tool 1: HYSQUAL Client Questionnaire**	**Training Module (Optional) - Week 3: Questionnaire Design** This module should be attended by the member of your team who would be assigned to work on questionnaire design. This module explains the important considerations when designing a client feedback questionnaire for the settlement sector. It also explains the phases of Client feedback questionnaires development.

NOTES:

3. Preparation for data collection. Use a survey-building tool such as **SurveyMonkey or Google Forms** to start **data collection.** Work with the WESO team to solve any problems related to data collection.	2 hours	Week 5		Quality Assessment Toolkit for Hybrid Settlement Services in Canada. • **Tool 1: HYSQUAL Client Questionnaire**	**Training Module (Optional) - Week 5: Data Collection** This module should be attended by the member of your team who would be assigned to work on data collection. After designing your client feedback questionnaire, now you need to choose a survey-building tool to collect client feedback. This module describes how to use online data collection tools such as SurveyMonkey or Google Forms to build your questionnaire. The module provides a guide on how to build different question formats and how to easily share links with your clients to collect their feedback and extract the data into Excel.

NOTES:

4. Questionnaire distribution. Start distributing the **HYSQUAL Client Questionnaire Tool** to clients. On an ongoing basis, frontline staff shares questionnaire links to clients' emails to collect feedback after service delivery. **Follow up meeting with WESO team.** WESO team will contact you to arrange a meeting to follow up on data collection. **WESO Office hours: 9 AM - 4 PM Monday to Friday**	Ongoing	Week 6-9		Quality Assessment Toolkit for Hybrid Settlement Services in Canada. • **Tool 1: HYSQUAL Client Questionnaire**	There is no minimum number of surveys required but at least 30 and above would be recommended to get some credible analysis.

NOTES:

5. **Data analysis.** Use **Ready-to-Use Excel Template** to perform analysis on collected client feedback. Pull the data from the survey-building tool and copy and paste it into the Excel Template. **Follow up meeting with WESO team.** WESO team will contact you to arrange a meeting to follow up on data analysis. **WESO Office hours: 9 AM - 4 PM - Monday to Friday.**	3 hours	Week 10-11		Quality Assessment Toolkit for Hybrid Settlement Services in Canada. • **Tool 2: Ready to Use Excel Template**	**Training Module (Optional) - Week 10: Data Analysis for Questionnaires using Excel** This module should be attended by the member be assigned to work on data analysis. After collecting client feedback and extracting the information from Excel, it is time to make sense of the data. WESO has created an automated Excel Template that generates a full Importance Performance Analysis and provides summary statistics and dashboards. Importance Performance Analysis is an easy-to-use managerial tool that points out the gaps between the performance and the importance of a certain aspect of service quality and highlights areas of priority for clients, to act upon and improve.

NOTES:

6. Plan for and implement changes. After reviewing the results of the **Importance Performance Analysis (IPA)** in the **Data Analysis Excel tool**, it is time to use this knowledge to implement changes and plan the action required to improve service quality. Use the **Continuous Improvement Plan Tool** to document areas flagged by the IPA report which need intervention from your side, assign responsibility and timelines, and review the outcomes of the intervention. **Share outcomes.** **Communicate** the outcome of the evaluation and the continuous improvement plan to all involved parties and get feedback on the results in periodic meetings. WESO team will contact you to arrange a meeting to follow up on the use of continuous improvement plan. **WESO Office hours:** **9 AM – 4 PM** **Monday to Friday**	2 hours	Week 12		Quality Assessment Toolkit for Hybrid Settlement Services in Canada. **Tool 3: Continuous Improvement Plan**	

NOTES:

TOTAL:	12 hours	12 weeks	

Glossary of Terms

ASYNCHRONOUS

Asynchronous services refer to activities that are delivered via online technology with no human interaction (i.e., filling out a form on a website).

BARRIERS

Obstacles or challenges that hinder or restrict access to services or experiences.

CONFIRMATORY FACTOR ANALYSIS

A statistical technique used to test the fit of a predefined factor structure or model.

DATA-DRIVEN DECISION-MAKING

The practice of making decisions based on data and analysis rather than solely relying on intuition or personal judgment.

DECISION-MAKERS

Individuals who have the authority to make important decisions within an organization.

DIGITAL DIVIDE

Refers to the gap or disparity between individuals or communities with access to digital technologies and those without.

DIGITAL EQUITY

Digital Equity is a condition in which all individuals and communities have the information technology capacity needed for full participation in society, democracy, and the economy. Digital Equity is necessary for civic and cultural participation, employment, lifelong learning, and access to essential services.

DIGITAL INCLUSION

Digital Inclusion refers to the activities necessary to ensure that all individuals and communities, including the most disadvantaged ones, have access to and use of Information and Communication Technology (ICT) solutions.

DIGITAL LITERACY

Digital Literacy is the ability to use information and communication technologies to find, evaluate, create, and communicate information, requiring both cognitive and technical skills.

DIGITAL TRANSITION

Digital transition refers to equipping clients with the necessary skills and knowledge to effectively use digital technologies and online services, facilitating their shift from offline to online platforms for various tasks.

EVALUATION

The process of assessing and determining the value, effectiveness, or quality of something, such as a program or service.

EXPLORATORY FACTOR ANALYSIS

A statistical technique used to identify underlying factors or dimensions within a set of observed variables.

FRONTLINE STAFF

Refers to the staff members who directly interact with clients or customers.

HYBRID SERVICES

Hybrid Service refers to a service delivery mode where clients have the option to interact with service providers both offline/in-person and through online platforms. It combines the convenience of online access with the personal touch of in-person interactions, giving the clients flexibility to choose the mode that works best for them.

IMPORTANCE PERFORMANCE ANALYSIS

Importance Performance Analysis is a managerial tool that assesses the importance and performance of statements or factors based on client responses. It categorizes these statements into four quadrants to identify areas needing improvement, possible overkill, areas to maintain focus, and low-priority areas.

INFORMED CONSENT

Informed consent involves obtaining individuals' voluntary agreement to participate in an evaluation or research activity after providing them with clear information about the purpose, data privacy, use of results, and potential risks.

INTENTION TO USE HYBRID SERVICES

Refers to the likelihood or inclination of newcomer clients to utilize online and offline service delivery methods.

NEWCOMER-SPECIFIC DIMENSIONS

Newcomer-Specific Dimensions are centered around the client and include client barriers to accessing online services and the preference of the client for in-person services.

ORGANIZATIONAL CAPACITY

The ability and resources of an organization to effectively carry out its functions and meet its objectives.

PERCEIVED EASE OF USE

The degree to which individuals perceive that using a particular technology is effortless or uncomplicated.

PERCEIVED SECURITY

Perceived security refers to the subjective perception and confidence that clients have regarding the safety and security of sharing their information with the settlement service provider.

PERCEIVED USEFULNESS

The extent to which individuals believe that a particular technology will enhance their performance or meet their needs.

PERFORMANCE MEASUREMENT FRAMEWORK

A structured approach or system used to assess and evaluate the performance or effectiveness of a particular process, service, or organization.

REAL SECURITY

Real security refers to the concrete measures and actions taken by an organization to ensure the protection and privacy of client information, including consulting with cybersecurity experts, implementing safeguards, and training staff on handling sensitive data.

SERVICE DELIVERY IMPROVEMENT (SDI) INITIATIVE

IRCC's SDI initiative improves settlement services for newcomers through innovative projects, leveraging technology and increasing employer involvement. It aims to enhance effectiveness, efficiency, and outcomes while building sector capacity.

SERVICE QUALITY

The level of excellence or satisfaction experienced by clients or customers when receiving services.

SERVICE-SPECIFIC DIMENSIONS

Service-Specific Dimensions are dimensions that are centered around the SPO and include the dimensions that should be addressed by management to motivate and encourage clients to use remote and online services.

STRUCTURAL EQUATION MODELLING

A statistical method used to analyze the relationships between variables and test theoretical models.

SYNCHRONOUS

Synchronous services refer to activities that are completed through simultaneous tech-mediated connection (i.e., video meetings).

SPOs

Settlement Service Provider Organizations, which are organizations that provide services and support to newcomers or immigrants.

TECHNOLOGY ACCEPTANCE MODEL

A theoretical model that explores how users perceive and accept new technologies.

WEB SECURITY

Web security refers to the measures and practices implemented to safeguard sensitive client information shared during online transactions. It involves ensuring the privacy and protection of personal data, as well as creating a sense of trust and confidence for clients when sharing such information.

WEBSITE CONTENT AND ACCESSIBILITY

Accessibility refers to the design, organization, and communication of website content to ensure easy access and navigation for newcomers seeking information and services. A well-structured and user-friendly website enhances service quality, saves time and resources, and plays a crucial role in promoting the acceptance of online services by clients.

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